




BMJ Open Epistemologies, methodologies and theories used in qualitative Global North health and social care research: a scoping review protocol

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ABSTRACT

Introduction In qualitative research, there are different approaches to defining and engaging with social reality. Epistemology, as the study of knowledge and knowledge creation, influences the methodologies and theories used by researchers. A growing literature questions the universality of Western-centric and Global North research methodologies and theories and highlights their Western epistemological roots. While Western frameworks are appropriate for Western contexts, it is a fallacy to assume that they represent global realities, thereby marginalising Global South knowledge systems. Thus, the aim of this scoping review is to analyse the underlying epistemologies, methodologies or theories that are evident in qualitative research conducted by researchers from the Global North in their research on, for or with people from the Global South.

Methods and analysis The review will be conducted using the Joanna Briggs Institute framework for scoping reviews. A search strategy will be developed to identify published and unpublished literature in CINAHL, Embase, Google Scholar, MEDLINE, ProQuest, PsycINFO and Web of Science. All potential papers will be exported to the reference manager Zotero, and the results will be uploaded to Rayyan. Studies are selected using a three-step process and documented using the Preferred Reporting Items for Systematic Reviews and Meta-Analyses flowchart. The abstracted studies will then be collated using the PAGER framework to identify the patterns, advances, gaps, evidence and recommendations that help to understand the review question.

Ethics and dissemination As this is a secondary analysis, our research does not require ethical approval, but we will scrutinise all included studies for inclusion of an ethical approval statement. We intend to share our findings through peer-reviewed international journals and presentations at conferences, as well as collaborating with colleagues in related fields.

Study registration The protocol for this scoping review has been registered with the Open Science Framework (<https://doi.org/10.17605/OSF.IO/5BUZX>).

INTRODUCTION

In qualitative research, there are different approaches to defining and engaging with

STRENGTHS AND LIMITATIONS OF THIS STUDY

- ⇒ The review team is experienced in the conduct of each stage of the review and has planned regular meetings to address process inconsistencies and resolve conflicting assessments.
- ⇒ The analytical PAGER framework for reporting scoping reviews was developed by three of the team members and is now widely used across multiple disciplines.
- ⇒ The use of shared software (Rayyan and Zotero) allows for efficient working across regions and countries.
- ⇒ Including grey literature reduces publication bias and allows for a wide examination of the literature beyond academia.
- ⇒ Reflective positionality statements on how the social situatedness of all members of the research team is likely to influence the proposed work.

social reality. Epistemology is the study of the nature of knowledge and knowledge creation and determines how social reality is understood.¹ In qualitative research, epistemology refers to the researcher's assumptions about how knowledge is constructed and understood and how it can be acquired. It shapes how a researcher views reality and directly influences the approach taken towards research. Different epistemologies, such as positivism, interpretivism or constructivism, lead to different understandings of what knowledge is and how it should be gathered. In contrast, theory has been defined as a big idea that structures numerous other ideas.² The choice of theory is influenced by the researcher's epistemology, as the nature of knowledge dictates how theories are applied or generated. In this way, theory is shaped by a combination of epistemology and methodology, with clear principles that guide how knowledge is sought in research. Methodology, however, refers to the general approach

a researcher takes to investigate a research question and determines what research methods to use.³ Methodology operationalises the researcher's epistemology and provides the practical tools for conducting research. The choice of methodology is informed by both theory and epistemological stance. In summary, these three concepts are interrelated: epistemology shapes the theories a researcher finds useful, and together they can inform the choice of methodology. Likewise, epistemology and methodology can influence the choice of theory.

While we support the inclusion of theory as a fundamental component of qualitative research,⁴ there is a growing body of critical literature that questions not only the applicability of Western-centric and Global North research methodologies and theories as universally valid concepts but also highlights how these are underpinned by Western epistemologies. This is what we refer to as theoretical or epistemic hegemony, that is, the privileging of certain forms of knowledge to the marginalisation and disempowerment of alternative perspectives.^{5,6} The social phenomenon that a particular theory interrogates is local, that is, situated within a given socio-cultural and socio-political space. Therefore, it is appropriate for Western lenses to be applied to Western social reality. As a side note, we recognise that the term 'Western social reality' implies a monolithic concept, but we also acknowledge the nuances in relation to marginalised groups within Western contexts, whose realities may differ from those of people of white European heritage. The error is in the over-reach or perhaps arrogance of assuming that the *Western* local represents the global. As researchers, we need to acknowledge that there are different ways of knowing and that Western domination risks marginalising and suppressing the knowledge systems of the Global South and Indigenous peoples that create a form of harm akin to what Thorne⁷ calls 'genocide by a million paper cuts'. We recognise and acknowledge the existence of critical frameworks, such as Decolonising Research⁸ or Critical Race Theory⁹, which have long challenged the dominance of Western methods, methodologies and theories in research and knowledge production by promoting a more critical understanding of the underlying assumptions, motivations and values that inform research practices. Experts from both Western and non-Western backgrounds are increasingly emphasising that insufficient critical engagement with essential topics, such as reflexivity, power and privilege, has led to a notable absence of reflection on the present condition of qualitative theoretical thinking. In a previous article, we urged qualitative researchers to examine the effects of prioritising Western-centric and Global North ways of knowing as superior, which sparked the team's interest in this topic. In our reading, the terms 'Global South' and 'Global North' are used as relational concepts. Rather than being characterised by distinct spatial limits, they represent evolving topographies formed by historically intertwined networks of exchange, dominance, exclusion and identity ascriptions. We also recognise that there

are marginalised peoples in the Global North, including Indigenous populations. By 'Western', 'Westernised' or 'Global North', we mean people of white Western European heritage in Westernised contexts, including Western Europe, North America and Australasia.

Challenges of applying Global North theories in Global South contexts

Simonds and Christopher¹⁰ present a compelling case study of an intervention research project in public health that illustrates major problems faced when Western research methods and theories—and ultimately Western epistemologies—were used on data gathered from the Crow Tribe of Montana, an Indigenous community in the United States. The case study demonstrates that using a Western methodology in an Indigenous setting may be unsuitable, given that the epistemological foundations of Western methods and theories do not correspond with Indigenous knowledge systems. This emphasises the importance of understanding how epistemological and methodological assumptions influence research design and theoretical orientation. In this context, epistemology is the theory of knowledge, and methodology is the justification for the methods used in a research project. Therefore, both influence the choice of theory, as different theories are based on different concepts of knowledge and how it should be obtained. These abstract considerations become concrete when we examine the practical consequences of methodological and theoretical choices.

For instance, the separation of Indigenous peoples' stories via content analysis (method) was viewed as a violation of the Crow cultural traditions by a community advisory board member, as the narratives possess a broader significance that is lost when they are divided into distinct themes. Furthermore, anonymising transcripts of interviews with revered elders disconnects their important personal influence on the community, thereby diminishing a crucial element of the narrative's impact. Finally, applying a Western health model (theory) to interpret the data does not align with Crow community preferences, reflecting a cultural bias that favours a linear and individualistic orientation, which is at odds with the Indigenous paradigm.

For several decades, Western-centric and Global North narratives have been consistently promoted in various regions worldwide and through numerous authoritative publications, which has consequently overshadowed the experiences of marginalised communities and people of colour. The continued dominance of monoculture Western-centric research paradigms ensures that mainstream narratives take precedence, resulting in the exclusion of Indigenous voices from scholarly conversations and further entrenching the marginalisation of these communities.¹¹ Epistemic hegemony has also been reported in academic publishing in the field of International Relations, which, according to Noda,¹² is hardly 'international'. The author argues that International Relations is a Western-dominated field that has established a Western

epistemological order as the scientific standard, which is not receptive to non-Western scholars and epistemologies and is rooted in past colonial relationships.¹² Yet, there is a growing movement among Indigenous communities to advocate for the decolonisation of research and the advancement of methods to disrupt the dominance of Western forms of knowledge.⁷ This entails critically examining the fundamental assumptions that underpin research (epistemology) and challenging the dominance of Western methods and theories as the sole form of legitimate inquiry.

As there is very little explicit discussion of the epistemologies, methodologies or theories used in qualitative research, we first need to scrutinise the existing research literature. The aim of this scoping review is to systematically review the health and social care literature and analyse the underlying epistemologies, methodologies or theories evident in qualitative research conducted by researchers from the Global North in their research on, for or with people from the Global South. According to the Cambridge Dictionary, social care literature refers to care provided by public organisations and private companies for people in society who require additional support to live comfortably. By using the PAGER framework for reporting scoping reviews,¹³ addressing this aim will help us to identify and map existing patterns, advances or gaps in the literature.

METHODS AND ANALYSIS

A scoping review allows a broad scope and the inclusion of grey literature from a wide range of scholarships and sources and has been chosen in this case as less constraining than a systematic review.¹⁴ The review emerges from previous work among the research team on theoretical clarity in qualitative research⁴ alongside an observation that traditional qualitative approaches appear to privilege white person-centred methods (interviews and focus groups) as *de rigueur*.

The review will be executed in accordance with the comprehensive framework for conducting scoping reviews provided by the Joanna Briggs Institute (JBI).¹⁴ The JBI framework was developed based on the influential frameworks of Arksey and O'Malley¹⁵ and Levac *et al*,¹⁶ with the latter enhancing clarity and rigour by providing more detailed guidance for each stage of the review process. In addition, we will incorporate a social justice perspective,¹⁷ focusing on the critical role of social power relations, which serve as the root cause for the dominance of Western forms of knowledge. As scoping reviews are a Western methodology, we have adopted a decolonising approach to the research, incorporating ways of knowing grounded in Global South perspectives. Drawing on this social justice approach, our research team is composed of both Global North (ORH, CBJ and JT) and Global South (CO) perspectives, facilitating a process of questioning the taken-for-granted or a priori assumptions of Western world views embedded in the findings of primary

Table 1 Inclusion criteria

Inclusion criteria	
Population	Indigenous Global South Western Racialised or minoritised populations
Concept	Epistemologies and methodologies
Context	Culturally appropriate, alternative or adapted research methods
Types of evidence sources	Primary qualitative research studies Relevant literature reviews will be examined to identify primary sources. Grey literature

studies through reflexive interpretation. Alvesson and Sköldbberg¹⁸ describe reflexive interpretation as a process of iterative comparison, reflection and conceptualisation between competing interpretations, which facilitates the development of novel insights. We will report according to the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) Extension for Scoping Reviews checklist.¹⁹

During October 2024, preliminary searches were undertaken to ensure that there were no published or ongoing systematic or scoping reviews on the subject (Google Scholar, Cochrane Database of Systematic Reviews, JBI Evidence Synthesis and PROSPERO). The scoping review will commence in autumn 2025, with anticipated completion in autumn 2026.

Review question

The Population, Concept, Context (PCC) framework was used to develop the primary review question¹⁴: 'What theories, epistemologies and methodologies are evident in contemporary health and social care studies that are conducted by researchers from the Global North, on, for or with, people from the Global South?'

Inclusion criteria

Eligibility criteria are informed by the PCC framework (table 1).

Search strategy

Aligned with the JBI three-step approach,¹⁴ the search strategy is created to capture both published and unpublished literature. First, search terms will be tried in MEDLINE, and additional subject headings and synonyms will be derived from relevant papers. A second search using the known terms will be undertaken in further databases: CINAHL, Embase, Google Scholar, MEDLINE, ProQuest Dissertations and Theses, PsycINFO and Web of Science (Core Collection). All relevant manuscripts will be searched for additional sources and supplemented by Google searches.

The following keywords or Medical Subject Headings will be used initially: methodological/theoretical imperialism; indigenous methodologies/science/health

research; decolonis(z)ing research/methodology(ie,s)/approach(es); epistemicide, Western knowledge systems, theoretical hegemony, adapting Western research, Western theory(ie,s), Western epistemology(ie,s), euro-centrism, Eurocentric paradigms, Western academic oppression, Western straitjacket, incorporating Indigenous ways of knowing, monoculture Western research, disempowerment, marginalisation, aboriginal, First Nation(s), First People(s), epistemic exclusion, epistemologies of ignorance, gendered racism, misogynoir, critical race theory (CRT), intersectionality, Black feminist theories. However, a range of relevant studies use very different keywords, and this initial list will be kept under frequent review.

All potential papers will be exported to the reference manager Zotero, where full-text copies can be imported by any member of the team and from where the reference list will be generated (see <https://www.zotero.org/>).

To ensure that the findings are contemporary, it is necessary to restrict the search of publications in the English language from 1995 to 2025. This timeframe has been chosen because the late 1990s marked the point at which the seminal work of Greenhalgh *et al.*²⁰ for example, first began to discuss culturally sensitive research. While restriction to the English language potentially introduces some bias, logistical reasons (funding, time, translation and location) preclude this. Any seemingly relevant studies that we cannot access will be noted.

Source of evidence selection

Results will be uploaded from Zotero to Rayyan software²¹ to allow concurrent and blinded review of the results. Duplicates will be abstracted automatically.

Data charting, extraction and analysis of evidence

Studies will be selected using a three-step process and documented by the PRISMA flow diagram (extension for scoping reviews)¹⁹:

1. Following the removal of duplicates, two reviewers will screen the titles and abstracts using predefined screening criteria based on whether studies adapted research methods to account for cultural differences and preferences and/or include information about the challenges of theoretical hegemony and/or include information about the outcomes of interest. All included articles must contain empirical data.
2. The lists from the two reviewers will be discussed until a consensus is reached. Discrepancies will be discussed with the entire team.
3. Full-text versions of the potentially relevant articles will be obtained, and the inclusion-exclusion criteria applied.

All four reviewers will undertake data abstraction into a bespoke template adapted from the PRISMA statement,¹⁹ which includes title, methods, number of participants, context, relevant findings, cultural adaptations, positionality statements and discussion. The form will be piloted across all reviewers on three included studies and adapted

as necessary. Where abstraction is unclear or contentious, the team will discuss the matter until consensus is achieved.

The information abstracted from the studies will then be collated using the PAGER framework¹³ to determine the patterns, advances, gaps, evidence and recommendations that help understand the review question. PAGER was developed by members of the team and has been widely used across multiple disciplines.

Positionality statements of the research team

ORH, the lead author, identifies as a white German man who is Catholic and a well-educated university professor, with academic experiences across Europe, Africa and South America over many years. This social situatedness reflects a position of relative privilege within Global North academic structures, which may shape how the review is conceptualised and conducted.

CBJ identifies as a white British woman. She has undertaken extensive qualitative research nationally and globally regarding violence against women and girls. She led the team that developed the PAGER framework that will be used in this scoping review.

CO is a social care academic of black African heritage and a British citizen residing in the UK. Her research and pedagogy are grounded in a decolonial framework, through which she actively centres marginalised knowledge, diverse epistemologies and Global Majority methodologies.

JT is a white woman who grew up in various countries in sub-Saharan Africa and has undertaken significant amounts of qualitative research in many African countries and with underserved communities in the Global North.

Team positionality statement

As a team, we have come together specifically for the purpose of undertaking this scoping review, but we have worked together in different configurations for 18 years. Three of the team members were the authors of the PAGER framework article. Acknowledging the positionality statements is essential, as it influences epistemological assumptions and interpretive lenses applied throughout the scoping review. Ongoing reflexive engagement aims to mitigate bias and remain attentive to alternative ways of knowing, particularly those grounded in Global South contexts.

Patient and public involvement

There will be no patient or public engagement at any stage of the review. The final review will be disseminated through publication, and health and social care researchers may find the results useful.

ETHICS AND DISSEMINATION

This is a scoping review which does not require ethical review. However, we will scrutinise all included studies for the inclusion of a statement regarding ethical approval and exclude any, where evidence of ethical approval is

missing. In terms of grey literature, we will look for indirect references to ethics, such as consent forms or data protection, even if no formal approval is noted. Any grey literature that lacks transparency about how data were collected or handled will be excluded.

The final scoping review paper will be submitted for publication in a peer-reviewed journal and presented at relevant international conferences. It is anticipated that the results of our scoping review, as published in that journal, will be used for teaching purposes by academics on courses concerned with ethics in research and decolonisation of the curriculum. This has become a prominent area of interest and importance in academia. To that end, the findings from this scoping review are likely to have broad application and appeal. It is our intention that this scoping review protocol, the published scoping review and dissemination at conferences will generate dialogue and communication between our team and other academics, students and communities who have a shared interest in this subject.

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Contributors ORH had the idea for the topic of this scoping review. ORH, CBJ, CO and JT have all made substantial contributions to the conception and design of the work. All authors have been involved in drafting the protocol or revising it critically for important intellectual content, have had final approval of the protocol version to be published and agree to be accountable for all aspects of the work in ensuring that questions related to accuracy or integrity of any part of the work are appropriately investigated and resolved. ORH is the guarantor.

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